



How to connect your Dropbox
account with Click & Drop



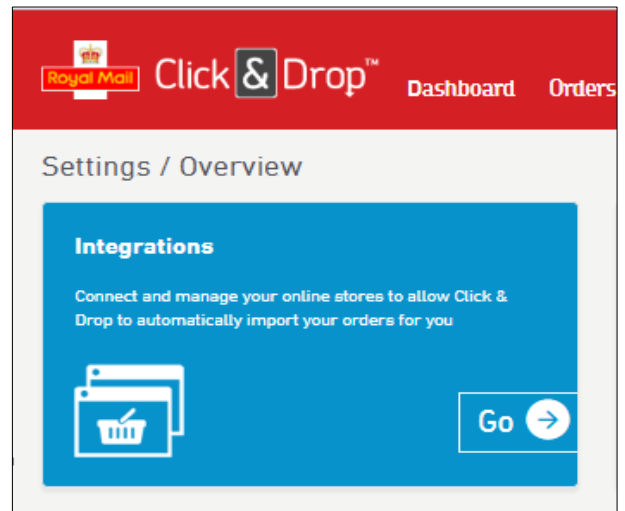
You can import/upload your orders quickly into Click & Drop by connecting your Dropbox account. Click & Drop will then pick up your order file from the designated folder and process your orders.

Connecting to your Dropbox account

Within Click & Drop, click on the 'Settings' link:



The 'Settings / Overview' page then opens up.

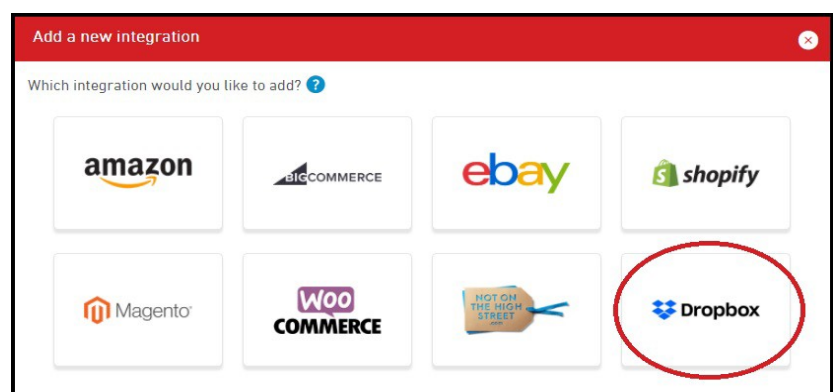


In the 'Integrations' section, click on the 'Go' button



Click on 'Add a new integration'

A new pop up window appears, asking you to choose which integration that you would like to add. Click on 'Dropbox'



A new window appears, asking you to input the information required to configure your Dropbox integration.

Add a new integration

Click here to view our help guide on how to connect your Dropbox integration to Click & Drop

Please be aware that you must map and import a spreadsheet manually at least once before this integration will recognise the file format and process subsequent files automatically for you.

If your spreadsheet does not include a header row, it must be saved as the default mapping using the 'Save as default mapping' checkbox when you manually import your spreadsheet.

* Indicates a required field

Trading name *
Test Trading Company

Integration name *
Test Trading Company - Dropbox

☐ Print labels automatically after import

Orders per printout limit
50

☐ Upload labels to Dropbox

☐ Upload reports to Dropbox

Configure printers

Cancel Save Save and connect

Trading name: Select your company's trading name from the dropdown box.

Integration name: This will be automatically populated once you have selected a trading name.

Print labels automatically after import: Select this option if you would like to print your labels automatically using Royal Mail Print Assist. For more information see [How to Use Click & Drop On Demand](#).

NB: labels will not print unless the orders have a weight, package size, and service assigned to them.

Upload labels to Dropbox: Select this option if you want the labels generated to be saved into your 'Results' folder. (Only available for OBA users).

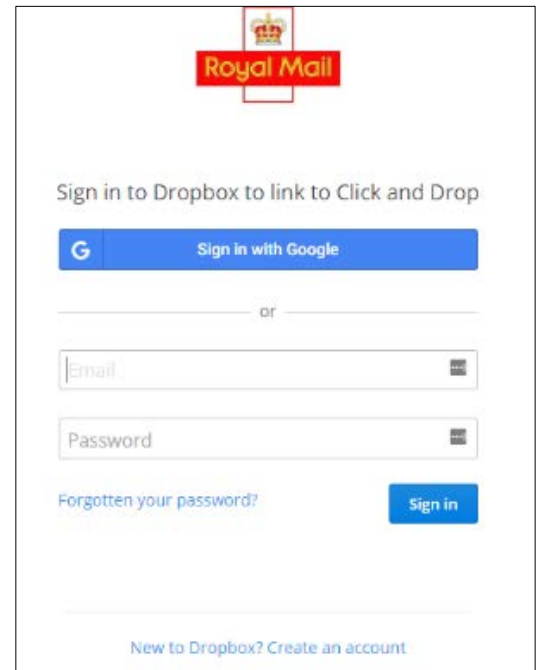
NB: labels will generate if your imported orders have a weight and package size assigned. For this reason, you cannot select to Upload labels to Dropbox in conjunction with our [Scan and Print](#) functionality.

Upload reports to Dropbox: Select this option if you want a CSV format report to be saved into your 'Results' folder. This will show basic data of orders that have a weight and service assigned.

Click the 'Save and Connect' button to continue. Alternatively, you can click the 'Save' button to save the integration so you can connect later.

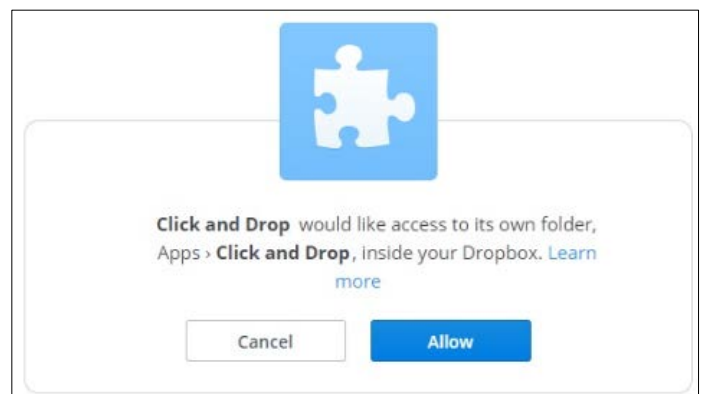
The 'Orders per printout limit' and 'Configure printers' options are linked to auto printing that is part of the Click & Drop on demand functionality – see [How to use Click & Drop On Demand](#) for more information on this.

Dropbox will now open in a new browser window. If you are not currently logged in, you will need to log in first.



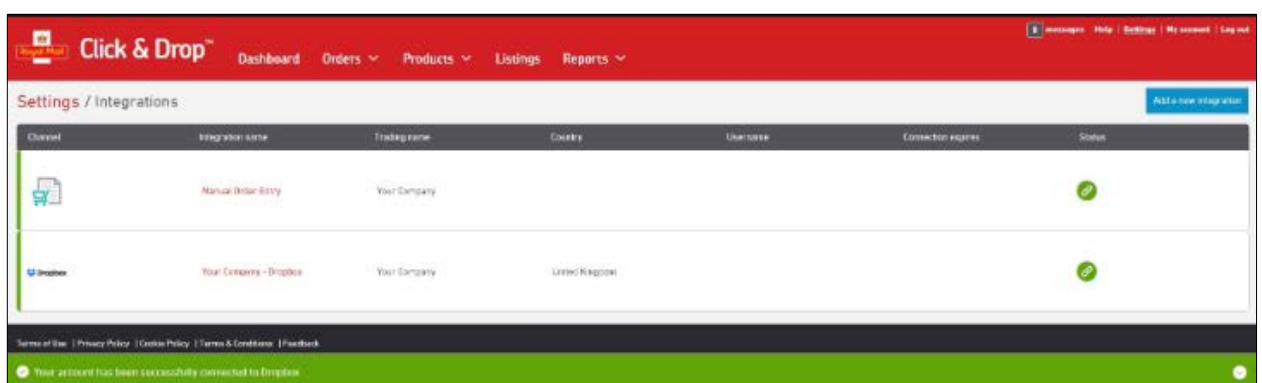
The image shows the Dropbox login interface. At the top is the Royal Mail logo. Below it, the text 'Sign in to Dropbox to link to Click and Drop' is displayed. There are two main login options: 'Sign in with Google' (a blue button with a 'G' icon) and a standard email/password login. The email and password fields are white with grey borders. Below the password field is a link for 'Forgotten your password?' and a 'Sign in' button. At the bottom, there is a link for 'New to Dropbox? Create an account'.

Then Click 'Allow' to give permission to Click & Drop to access a folder inside your Dropbox.



The image shows a permission dialog box from Dropbox. At the top is a blue square icon with a white puzzle piece. Below the icon, the text reads: 'Click and Drop would like access to its own folder, Apps > Click and Drop, inside your Dropbox. [Learn more](#)'. At the bottom are two buttons: 'Cancel' (white with grey border) and 'Allow' (blue).

Your 'Integrations' page will reload and if your connection has been successfully made, the chain link icon will turn green, and a message will appear to inform you the connection was successful.



You are now ready to begin importing orders.

A new folder will have been created within your Dropbox called 'Apps'. Within this folder, will be one called 'Click & Drop.'

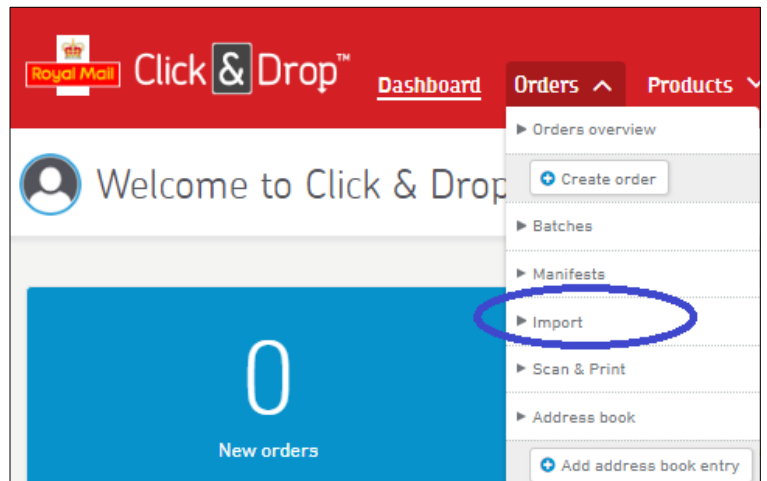
NB: Click & Drop is only given access to your 'Click & Drop' folder, and cannot read or edit data from any other folders within your Dropbox.

Mapping your spreadsheet fields

Before you can drop your spreadsheets containing your orders into the 'Click & Drop' folder in your Dropbox, you must first map your spreadsheet fields in Click & Drop. To do this, you have to complete a manual order import of at least one order. Don't worry, as it's a dummy order, it can be deleted before it reaches the billing stage.

You will only have to do this process once (unless you use multiple spreadsheet formats/layouts and/or you change your spreadsheet layout) as Click & Drop will remember your field mappings.

From any page within Click & Drop, hover over 'Orders', and from the drop-down menu, click on 'Import'.



You will be taken to the 'Order import' page where you can begin to map the fields of your spreadsheet to Click & Drop. This will ensure that any subsequent spreadsheets that you drop into your Dropbox account are recognised and processed by Click & Drop.

A screenshot of the 'Order import' page. The page is divided into three steps. Step 1: 'File upload' with a blue 'Upload a file' button. Step 2: 'Import settings' with two dropdown menus for 'Name format' (set to 'First and last names are separate') and 'Date format' (set to 'DDMMYYYY'). There are four checkboxes: 'The first row is a header' (checked), 'Use address book references' (unchecked), 'Use shipping address for billing address' (checked), and 'Create batches for the imported orders' (checked). There is also an 'Update product data' checkbox. Step 3: 'Field mappings' with a blue bar containing a message: 'Please upload a file above to see a preview of your data and to begin mapping the fields'. An 'Import orders' button is at the bottom right.

Now, click the 'Upload a file' button, and select the file that contains the file layout that you want to map from your computer or device.

Next, carefully select from the options provided on screen.

Name format: Choose the format that matches your order spreadsheet. Does your sheet show your customers first name and last name in separate fields or are they combined into one field?

Date format: Choose the format that matches the format of any dates in your order spreadsheet.

The first row is a header: This is selected as a default – this means that the first row of your spreadsheet contains row headers, such as 'first name' or 'address line 1'. If it doesn't, then simply unselect the check box.

Use address book reference: Select this option if you would like to enter the reference number for your address book entries instead of mapping each full address.

Please note that only existing address book entries can be used. More information on using the address book and creating new address book references is available [here](#)

Use shipping address for billing address: Select this box for Click & Drop to automatically use the shipping address data in your spreadsheet as the billing address data too. Otherwise, you can specify additional billing address data in your spreadsheet.

Create batches for the imported orders: Select this box for Click & Drop to automatically group your imported orders together into a batch, this will help save you time by allowing you to perform bulk actions on the orders such as generating labels and manifesting.

Now, you will need to map your fields.

The required fields your spreadsheet must contain are:

- Name (First name and last name separate or combined)
- Address Line 1
- City
- Postcode

All other fields are optional.

You will see that there is a help message to help you to identify where 'errors' are or where fields are missing.

In this example, it is showing that the upload file had 12 fields in it, 2 of them have automatically mapped, these are the 'First name' and 'Last name' fields, so the other fields need to be mapped.

To do this, use the drop-down menu in each column to choose the correct option for the data in your file, you can see your data underneath to make it easier to map correctly. Use the arrows to move across to map and view all columns

Step 3. Field mappings

* Indicates a required field

Information: You've mapped 2 of the 12 fields in your spreadsheet.
Warning: You've mapped 2 of the 6 required fields: Shipping address - First name ✓, Shipping address - Last name ✓, Shipping address - Address line 1, Shipping address - City, Billing address - Address line 1, Billing address - City

Showing columns 1 to 5 of 12

Email Address	First name	Last name	Shipping Address 1	Shipping Address 2
Steve@hotmail.co.uk	First name ✖	Last name ✖		
Steve@hotmail.co.uk	Steven	Bucky	3 COLDPARK ROAD	
afiu@gmail.com	Nelson	Rodriguez	Rua Marques de Almeida, 255	Brufe
allen@clarke.com	Allen	Clarke	4 HIGHFIELD ROAD	
alsinus@yahoo.com	Herman	Barnes	2725 S Quincy St Apt 914	
AlunaB5@hotmail.com	Chris	Anfield	U 2 62 MINNIPUP RD	
edrien@puach.com	Adrian	Putch	Kolping-Str. 6	

Information: Only the first 6 rows of your spreadsheet are shown here to help you to make sure that you're mapping the correct fields. The whole spreadsheet will be used during the final import process.

You can find a full guide on manually importing orders on our [Click & Drop Support Hub](#).

Once you have mapped the fields of your spreadsheet, click on 'Import Orders' to check that everything is mapped correctly.

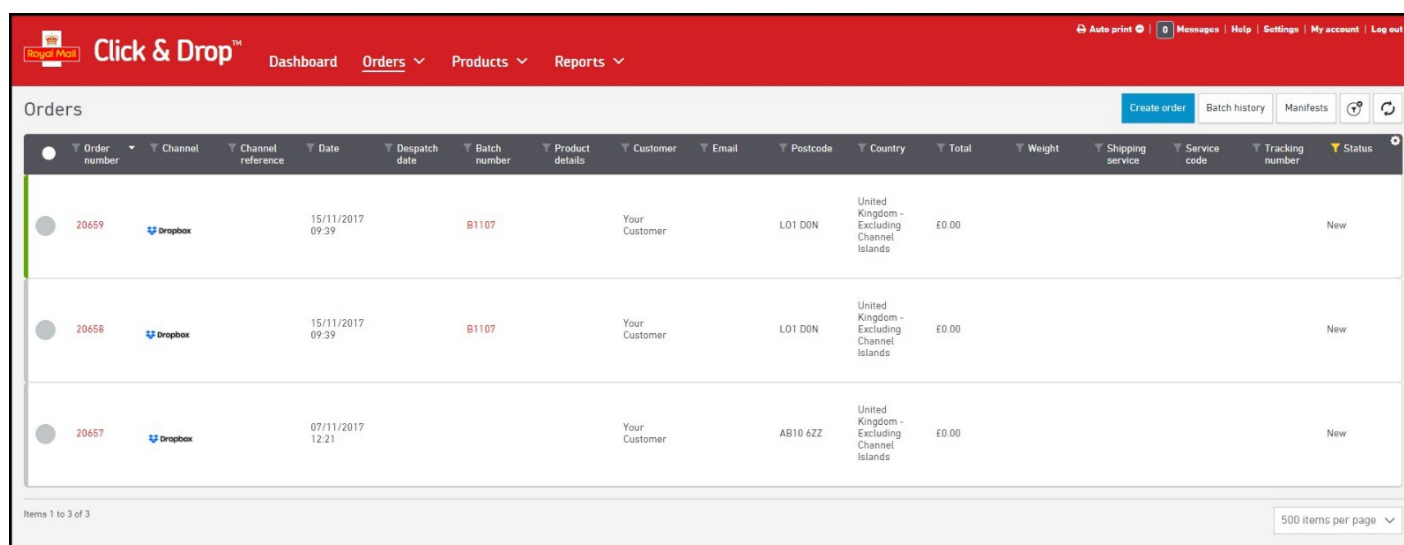
You will see a message appear across the bottom of the screen

✓ 1 order has been imported (see imported batches)

Depending on what level of data is within your file and what shipping rules you have set up, you will then need to find that order and delete it so it doesn't get processed.

Importing your orders using Dropbox

Now you have mapped the fields of your spreadsheet, you can now simply drop any order spreadsheets into your Click & Drop folder in Dropbox and the orders will automatically import.



The screenshot shows the 'Click & Drop' interface with the 'Orders' tab selected. A table displays three imported orders. Each row includes a circular status icon, an order number, a channel (Dropbox), a date, a despatch date, a batch number, product details, customer name, email, postcode, country, total, weight, shipping service, service code, tracking number, and status.

Order number	Channel	Channel reference	Date	Despatch date	Batch number	Product details	Customer	Email	Postcode	Country	Total	Weight	Shipping service	Service code	Tracking number	Status
20659	Dropbox		15/11/2017 09:39		B1107		Your Customer		L01 D0N	United Kingdom - Excluding Channel Islands	£0.00					New
20658	Dropbox		15/11/2017 09:39		B1107		Your Customer		L01 D0N	United Kingdom - Excluding Channel Islands	£0.00					New
20657	Dropbox		07/11/2017 12:21				Your Customer		AB10 6ZZ	United Kingdom - Excluding Channel Islands	£0.00					New

Items 1 to 3 of 3

500 items per page

Using Dropbox with multiple workstations

See our help article on [How to use Click & Drop On Demand](#)

The different folders in Dropbox explained

Within the Apps folder of Dropbox, you will see the Click & Drop folder, and within that folder there are two more folders Results and Archive.

Click & Drop: this is where you drop your order files that you want to import

Results: a spreadsheet showing your order import details is saved here once your order files have been received by Click & Drop. This contains data of the order number, Channel, Channel reference, Printed date, Recipients name, Tracking number & Package size. If you have also selected that your labels are uploaded to Dropbox, they will appear in this folder too.

Archive: this is where all your successfully imported order files are stored or if there was an error in the file, these will be stored in a sub-file called Errors within the Archive file.

NB: A copy of your label will only be placed in your results file if your printers are active and connected. Any tracking numbers in your results folder will not be updated if you make any changes to the orders elsewhere within Click & Drop.

The naming convention used for files

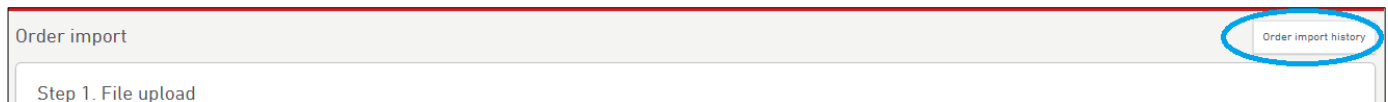
Files are saved with their original file names, prefixed by a string of digits representing the date and time. The prefix is arranged: year, month, day, hour, minute, second, fraction-of-second.

For example, if your original filename was 'Order1', then your despatch report spreadsheet may look like this: 201802201246123865.Order1.csv

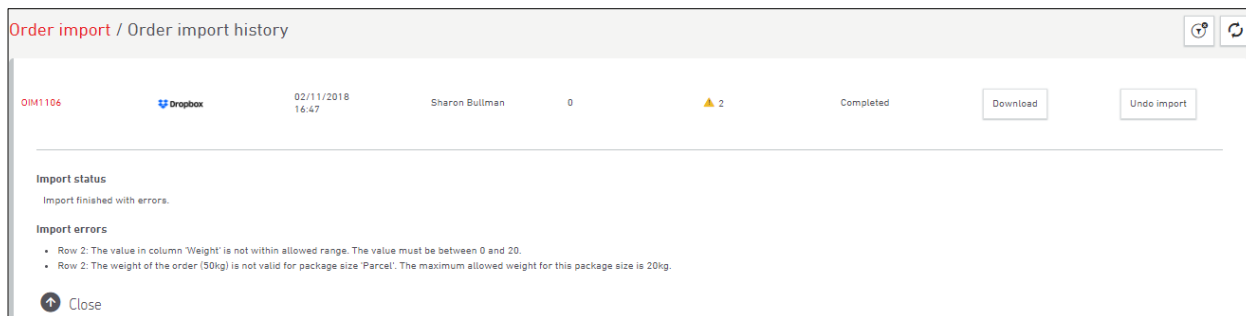
Your spreadsheets are saved in .csv format, and labels are saved as .pdf.

What happens if your file contains errors

If your file contains an error, you can view the details on the 'Order import history' page, that can be found by selecting 'Orders' and then clicking on 'Import' and then click on 'Order Import History'



From here you will be given an explanation of the fault, and have the option to download the file in order to fix the erroneous entries, or to undo the whole file import.



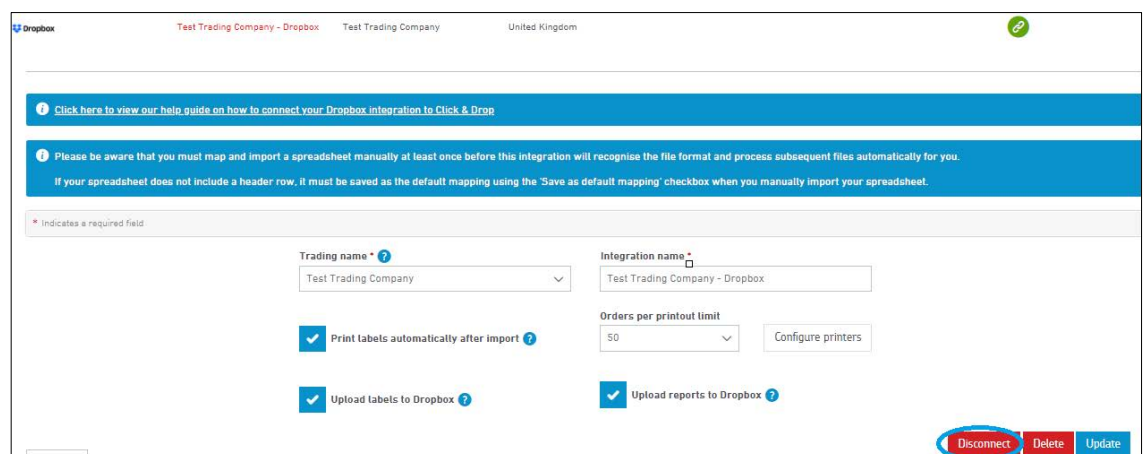
Please note that in imports containing more than 1 file, any successful orders will still download even if one or more unsuccessful orders creates an error.

How to disconnect your Dropbox integration

You can disconnect your Dropbox integration at any time by navigating to 'Settings' > 'Channels and stores'.

Click your Dropbox integration to expand the integration details, and click

'Disconnect' as shown:



You can reconnect your Dropbox integration at any time by following the above instructions again.

NB: You should only delete your integration if you are going to use a new Dropbox account, or if you wish to permanently delete your integration.